
Appendix A: Glossary

The profession of librarianship has a language all its own. Below is a list of selected library terms and acronyms used by Montana public libraries. Trustees' familiarity with these will enhance communication between the Board and director.

AACRII (Anglo-American Cataloging Rules):

Second edition of AACR was published in 1998. It establishes the standard set of rules for cataloging procedures and decisions used by most libraries in English speaking countries.

abstract: Brief description of a document, prepared by an author or professional abstracter, which identifies its major points.

academic library: Library established and maintained by a junior college, tribal college, community college, four-year college, or university organized and administered to meet the information needs of its students, faculty, staff and others by agreement.

access: Availability of a library and its services to the population it is intended to serve. In a larger sense, access is the ability to obtain information through a library and its cooperative links to additional resources.

accredited library school: School that teaches library and information science at the master's degree level and that has qualified for accreditation under requirements of the American Library Association.

acquisitions: Process of acquiring the library materials that make up the library's collection.

ADA (Americans with Disabilities Act): National legislation giving civil rights protection to individuals with disabilities; it impacts libraries as service providers and as employers.

affirmative action: Policy of promoting equal employment opportunity through methods of recruitment, training and promotion.

ALA (American Library Association): Founded in 1876, ALA is the national association serving the interests of libraries.

ALTA (Association of Library Trustees and Advocates): Association of public library trustees and advocates affiliated with the American Library Association.

automation: All aspects involved in using a computer system for such tasks as circulation, cataloging, acquisitions, interlibrary loans, etc.

BCR (Bibliographic Center for Research): Headquartered in Denver, BCR is a broker for bibliographic services, databases and training required by its member libraries.

bibliographic database: Computerized listing of books, periodicals or other library materials from which information can be extracted by a number of identifiers related to the bibliographic description of the item.

bibliographic records: Cataloging information used to describe and access an item such as a book, magazine, video or sound recording, map, etc.

bibliographic utility: Computer-based network offering support functions to libraries, particularly in cataloging/technical services. See also OCLC.

bibliography: Complete or selected list of documents related by author, subject, publisher, etc.

BIP (Books in Print): Listing of currently available titles used for ordering books. BIP is available in a multi-volume print set, on CD-ROM or online by subscription.

branch library: Auxiliary unit of a public library which has separate quarters, a permanent collection, permanent staff and scheduled public hours. Branches are administered by a central unit.

call numbers: Classification number on an item of library material used to mark the item, shelve it properly, list it in the card catalog or computer, and find it for a user. Dewey Decimal and Library of Congress are two classification systems used for call number development.

Carnegie Library: Library building built fully or in part with funds contributed by Andrew Carnegie and characterized by a common architectural style.

catalog: File of bibliographic records created according to specific uniform principles of construction, which describes the materials in a collection, a library or a group of libraries. It may be in the form of a card catalog, a book catalog or an online catalog.

cataloging: Process of physically describing library materials, including assigning subject headings and a call number, so that the items can be located in the catalog or on the shelf.

CD/DVDs (compact disc/digital video disc): High-capacity storage devices that uses laser technology to read data in digital form. Available in a variety of formats: CD-ROM: Read Only Memory; CD-R: Recordable (one-time only recordable); CD-RW: Read/Write (re-recordable), DVD-RN, etc.

CE (continuing education): Opportunities provided for personnel to improve and grow in their professions.

certification: See *Montana Library Certification Program*.

circulation: Activity of a library in lending materials to borrowers and the recording of these transactions.

city library: Free public library for city residents which is established, maintained and supported through taxation by a city, town or other municipality and whose board of trustees is appointed by the mayor. Refer **MCA 22-1-301**.

city-county library: Library established by a contract between a city and a county government to provide library services for a specific population in a defined area. Refer **MCA 22-1-316**.

classification system: System for arranging books and other materials according to subject or form. The two most common systems in use are Dewey Decimal and Library of Congress classification systems.

collection: Total accumulation of all library materials provided by a library for its patrons. Collection is also used to describe a group of library materials having a common characteristic (e.g., Children's Collection, Reference Collection, Local History Collection, etc.).

collection management: Planned process of selecting and acquiring library materials to meet the needs of the library's community. It includes assessing user needs, adopting a collection management policy, studying collection use, selecting materials, maintaining the collection and weeding. Cooperative collection management refers to a group of libraries working together to identify collection strengths and minimize duplications.

complaint: In intellectual freedom cases, an oral charge against the presence and appropriateness of material in the library collection.

Complainants are usually requested to complete and file a written form. Also referred to as a challenge.

Connexion: Online cataloging software from OCLC used by Montana libraries to obtain records for local automation systems and add local holdings to the WorldCat database using the Web.

cooperative system: Group of libraries banded together by formal or informal agreement which states common services to be provided, such as cooperative book buying, shared cataloging and cooperative reference service. This can also be a consortium of libraries joining together for all participants to benefit from a statewide license or statewide database subscription. See also *magazine database, full-text*.

copyright: Exclusive privileges of publishing and selling a work granted by a government to an author, composer, artist, publisher, etc. Copyright is a right of intellectual property whereby authors obtain, for a limited time, certain exclusive rights to their works. Libraries have a special interest in fair use of copyrighted material.

county library: Free public library for the use of the whole county, which is established, maintained and supported through taxation by a county, and whose Board of trustees is appointed by the county commissioners. Refer **MCA 22-1-303**.

database: Systematic organization of information stored in a computer file for ease of searching, update and retrieval.

depository library: A library that is legally designated to receive free copies of all or selected government publications and make these documents available to the public.

Depreciation Reserve Fund: See *Library Depreciation Reserve Fund*.

Dewey Decimal Classification: Subject classification system for books developed by Melvil Dewey (1851-1931) that divides all knowledge into ten classes arranged in numeric sequence and further divided by a decimal system. Dewey classification is used in most public libraries.

district: See *library district*.

end user: Library user who requests and uses information obtained from an online search.

E-Rate: Federal program providing discounts to eligible schools and libraries for access to telecommunications and information services, including basic local and long-distance phone services, Internet access services, and acquisition and installation of network equipment. The Universal Service Administrative Company's Schools and Libraries Division administers the E-Rate program for libraries.

expenditures per capita: Measurement comparing the expenditures of the library to the size of the service area population.

fair use: Special conditions (such as criticism, news, teaching or research) under which all or portions of copyrighted work may be reproduced without infringing upon the copyright laws.

federation: Geographical grouping of libraries of all types working together to provide a broader range of resources and services than each individual library can offer alone. Montana is divided into six federations; each has an advisory board and federation coordinator.

FirstSearch: An online database search tool that librarians can use for interlibrary loan and online searching of materials.

foundation: Library foundations are separate, nonprofit groups that operate independently from the library to help with fundraising for the benefit and improvement of the library.

freedom to read: Guaranteed freedom in the U.S. Constitution. A Freedom to Read Statement was adopted in 1953 (revised in 1972, 1991 and 2000) by the American Library Association and the American Book Publishers Council describing the need for publishers and librarians to make available the widest diversity of views and expressions, including those that are unorthodox or unpopular. Many Montana libraries have adopted the Freedom to Read Statement.

Friends of the Library: Group of volunteers organized to support a particular library through lobbying, public relations, fundraising and program assistance.

FTE (full-time equivalent): A measure used by human resources personnel to indicate the number of full-time workers who would be employed if all part-time positions were added together. The FTE calculation is used for budgeting and reporting purposes.

FY (fiscal year): Used in budgeting to identify the twelve-month accounting period under which an organization operates.

hardware: Bolts, nuts, board, chips, wires, transformers, circuits, etc. in a computer; the physical components of a computer system.

holdings: All the cataloged and uncataloged materials in the possession of the library.

holdings per capita: Measurement comparing the size of the library collection to the size of the service area population.

home page: Main page of an Internet web site.

income per capita: Measurement comparing the income of the library to the size of the service area population.

ILL (interlibrary loan): System of interlibrary cooperation, which allows libraries to obtain information and materials for their users from other cooperating libraries. See also *resource sharing*.

IMLS (Institute of Museum and Library Services): Independent federal agency that provides programs of support for both libraries and museums and encourages library-museum partnerships. The agency administers the Library Services and Technology Act (LSTA) grant program to states.

InfoTrac: See *magazine database, full-text*.

institutional library: Library within a correctional facility, rehabilitation center, care facility or other institution that serves the library needs of residents and staff.

intellectual freedom: Right of individuals to the free and open exchange of information and ideas. This right is supported by the American Library Association, the Montana State Library Commission and individual libraries through commitment to the Library Bill of Rights and the Freedom to Read Statement. Public libraries safeguard intellectual freedom by providing a collection representing all viewpoints and equal service to all members of the community.

Internet: International system of computer networks through which libraries and individuals may communicate and share information via e-mail, databases, and other methods. See also *web*.

ISBN (International Standard Book Number): Unique identification number printed in books by international agreement.

ISSN (International Standard Serial Number): Unique identification number for each serial publication.

jobber: Wholesale book supplier who supplies many titles from different publishers and sells them to libraries and retailers.

keyword: Word used in an information retrieval search to find a particular word in an author, title, abstract or subject field. This is especially useful when the word is not used as a recognized subject term within the index being searched.

LAN (local area network): Network that connects nearby computers, usually in the same building, using cables or wireless technology.

LBEP (Library Board Education Program): Library Services and Technology Act (LSTA) funding administered by Montana State Library, enabling basic trustee Board training by other public library trustees. Training is provided on request and trainers volunteer their services.

LC (Library of Congress): National library of the United States that serves the U.S. Congress and provides services to all types of libraries.

LDD (Library Development Department): Division of Montana State Library that provides consulting services and training to librarians in Montana to assist with the improvement of library services statewide.

Library Bill of Rights: Policy statement adopted in 1948 (and reaffirmed in 1961, 1980 and 1996) by the American Library Association concerning service to all people, free expression of ideas and censorship. Many Montana libraries have also adopted this policy statement.

Library Depreciation Reserve Fund: Fund in which a library can hold money in reserve beyond the year it is allocated to be used at a later time for replacement and acquisition of property, capital improvements and equipment necessary to maintain or improve library services. Refer **MCA 22-1-305**.

library district: A form of public library governance whereby the library district board is responsible for all aspects of running the library. The library may have a contract with local government for certain services, but the final say belongs to the library. Library districts are funded by special mill levies and trustees are elected by the public.

Library of Congress Classification: Subject classification system for books devised by the Library of Congress that divides knowledge into 21 subject areas and has a notation of letters and figures that allows for expansion. The system is used mostly in academic and special libraries.

long-range plan: Document adopted by a library's governing Board outlining the goals, objectives and action plans for the library's operation and development over a designated time period, usually three to five years.

LSTA (Library Services and Technology Act): Administered under the Institute of Museum and Library Services with the primary focus on improving library services through technology, encouraging sharing of resources and targeting library and information services to underserved populations. LSTA grants are awarded annually to all state libraries for use in statewide and local projects. In Montana, the Montana State Library Commission establishes priorities for LSTA funds.

magazine database, full-text: Online periodical index that allows searching of subject specific magazine article citations. The database may also provide the complete text of the article located. Such databases allow library patrons to access full-text versions of thousands of magazine and journal articles. Examples of full-text magazine databases include EbscoHost, Electric Library, InfoTrac and SIRS Researcher. See also *cooperative system*.

MARC (machine readable cataloging): Standardized arrangement of bibliographic information for computer-based catalog records to permit sharing with other automated systems.

microform: Generic term for any medium that contains miniaturized records such as microfilm or microfiche. Microforms require special readers to enlarge the images so the information can be read.

mill levy: Number of mills (one mill equals one-tenth of a cent) that is multiplied by the value amount (assessed or adjusted) of property to determine the amount of tax to be paid by the property owner.

mission statement: Concise expression of the library's purpose and service priorities.

MLA (Montana Library Association): State association with a membership composed of librarians from all types of libraries, trustees, friends and students. MLA's concerns are the welfare and professional development of its members, the advocacy of library needs and the assurance of open access to information for all Montana's citizens.

MLNCat: Online web-based portal providing access to virtual and actual Montana library catalogs as well as periodical databases and OCLC's WorldCat database.

MLS (Master of Library Science): Graduate degree from a library school or department.

Montana Library Certification Program: Program adopted by the Montana State Library Commission to encourage library directors, staff members and trustees to maintain, acquire and develop their skills and knowledge through basic and continuing education.

Montana Library Event Calendar: An online calendar listing upcoming library training events and activities to assist librarians and trustees with planning.

Montana Shared Catalog (MSC): A shared online catalog and circulation system hosted by Montana State Library composed of member libraries of all types from across the state.

Montana State Library Commission: Governing body for Montana State Library. The governor appoints five members and two members are designees from the Office of Public Instruction and the Commissioner of Higher Education. Refer **MCA 22-1-101**.

MPLA (Mountain Plains Library Association): Eleven-state association, including Montana, which seeks to improve present and future library services throughout the region.

multijurisdictional library: Library operated jointly by two or more units of local government under an interlocal agreement that creates a jointly appointed board or similar means of joint governance. Distinguished from a library that contracts to serve other jurisdictions. Refer **MCA 7-11-1101**.

multitype library system: Cooperative system in which two or more types of libraries—academic, public, school, special, institutional—participate.

municipal library: See *city library*.

National Library Service (NLS) for the Blind and Physically Handicapped: Division of the Library of Congress, NLS offers free recorded and Braille-embossed books and magazines to individuals with visual and other physical conditions limiting use of regular printed materials. Montana State Library's Talking Book Library serves as a regional library for Montana.

network: Structured arrangement for connecting devices such as computer terminals or libraries for the purpose of communications, information exchange or cooperative services. A network can be local, regional, national or international.

NRIS (Natural Resource Information System): Division of Montana State Library, NRIS was established in 1985 to identify and acquire Montana's natural resource information and to provide a clearinghouse for this information.

objective: Measurable result to be achieved in a specific time period, used in library planning; for example, to increase the circulation of large print books by 25 percent during the next year.

OCLC (Online Computer Library Center): Nonprofit library service and research organization located in Dublin, Ohio, used by libraries to catalog library materials, arrange interlibrary loans and maintain location information on library materials. In Montana, many libraries of all types use the OCLC bibliographic database for cataloging, interlibrary loan and reference. See also *WorldCat*.

online search: Literature search of databases through a computer, usually performed by an online searcher as part of a reference service.

OPAC (Online Public Access Catalog): Automated catalog providing patron access through computers. See also *PAC*.

output measures: Measurements that reflect the results or outcomes that measure a library's performance. Examples of useful output measures for public libraries include title fill rate, subject fill rate, turnover rate, document delivery rate, in-library use, circulation, number of visitors, etc.

outreach programs: Programs provided by a library to people who are unable to use the library directly because of geographical, physical, mental or legal restrictions. Examples include service to nursing homes and institutions, bookmobile services, books-by-mail to the geographically remote and service to the homebound.

PAC (Public Access Catalog): User-friendly computer terminal that permits patron access to an automated library catalog. See also *OPAC*.

paraprofessional staff: Library employees without professional certification or entrance-level educational requirements but who are assigned supportive responsibilities at a high level and who commonly perform their duties with some supervision by a professional staff member.

performance appraisal: Process of evaluating the performance and behavior of employees individually in their positions to assess training needs and determine eligibility for retention, salary adjustments and promotion.

periodical: Type of serial publication that is issued regularly, each issue of which is numbered and dated consecutively and contains separate stories, articles and other writings.

PLA (Public Library Association): Division of the American Library Association.

PNLA (Pacific Northwest Library Association): Seven-member regional library association promoting regional library activities and cooperation among five states including Montana, and two Canadian provinces.

policy: Written statement passed by formal motion of the board of trustees which gives general guidelines for making decisions in the administration of the library.

processing: Process for preparing books and other materials for use by the public; may include cataloging, preparation of cards, attaching book pockets and protective covers, etc.

professional staff: Persons whose regular assignment requires either a college degree or experience of such kind and amount as to provide a comparable background.

public library: Any library that provides general library services to all persons in a given community, district, or region, and is supported mainly by local taxes. Refer **MCA 22-1-301**.

reference collection: Collection of books and other materials used for supplying authoritative information on identifying sources; kept together for convenience in providing information service and generally not allowed to circulate. Reference materials include abstracts, almanacs, bibliographies, dictionaries, directories, encyclopedias, indexes, statistical compendia, union catalogs, yearbooks, etc.

resource sharing: Cooperative arrangement among libraries to make available the resources of a library for use by the patrons of another library, usually through interlibrary loan or reciprocal borrowing. See also *ILL*.

retrospective conversion: Conversion of information from traditional card catalog cards to an electronic format. "Recon" is most often undertaken in preparing for installation of a local automated system or for a cooperative resource-sharing project.

RFP (request for proposal): Document issued to advertise for vendor proposals, equipment and software. Usually the RFP contains detailed specifications of the goods or services wanted.

school library: Library in an elementary, secondary or combined public school where a collection consisting of a full range of media, associated equipment and services from the school library staff are accessible to students, teachers and staff.

school/public library: Library serving as both a school media center and public library which is governed, funded and operated by one or more legally constituted administrative jurisdictions. School/public libraries are created by an interlocal agreement signed by two legal jurisdictions.

selection: Process of choosing the books and other materials to be purchased by a library.

serial: Any publication (periodicals, newspapers, annuals, journals, transactions of societies, numbered monographic series, etc.) issued in successive parts and bearing numerical or chronological descriptions.

service area population: Number of people in the geographical area for which a public library has been established to offer services and from which the library derives income, plus any areas served under contract.

shelflist: Type of catalog or inventory of items as they appear on the library shelf, that is, by classification number.

special library: Library which serves a special purpose or clientele and is maintained by an association, government service, research institution, learned society, museum, business firm, industrial enterprise or other organized group. The greater part of a special library collection is limited to materials concerning a specified field or subject.

staff development: Sustained effort to improve the overall effectiveness of personnel in the performance of their duties. See also *CE*.

standards for libraries: Guidelines or criteria developed at state and national levels requiring certain minimal standards deemed essential for proper operations of libraries. Montana Public Library Standards are approved and enforced by the Montana State Library Commission.

talking book: Book that has been recorded on record or tape for use by visually and physically impaired individuals.

TBL (Talking Book Library): Department of Montana State Library that provides free equipment and materials to Montana citizens who are visually or physically impaired. TBL is funded by Library Services and Technology Act (LSTA) funds. TBL materials are provided by the Library of Congress or are recorded by TBL volunteer readers.

technical services: All activities related to obtaining, organizing and processing library items, and maintaining them with repairs and renovation.

union catalog: Central catalog listing of library materials located in various libraries with individual library holdings indicated. The catalog may exist in a variety of formats.

Web or www (World Wide Web): One part of the Internet in which information is presented as text, graphics and multimedia. The user accesses and views a web page with a web browser such as Internet Explorer or Netscape Navigator. The user can navigate around a web page and /or view additional information on other web pages by clicking on text or graphics known as hyperlinks.

weeding: Part of collection management that selects library materials to be discarded or transferred to storage, based on standards of use, currency, condition and community needs.

Wired-MT: Electronic mail list used by Montana librarians to share information by posting e-mail messages that are automatically distributed to participating libraries statewide.

WorldCat: OCLC's web-based database that subscribing libraries can use for cataloging, reference and resource sharing.

Z39.50: Standards protocol, which gives library users easy access to another library's automated system. The benefits of Z39.50 are that the interface is controlled by the user's system. Familiar search strategies and cursor commands are available, and the computer, rather than the user, translates between local and remote machines.

Appendix B. Public Library Standards

SUBSTANTIVE RULES 10.102.1150

10.102.1150 PUBLIC LIBRARY STANDARDS (REPEALED) (HISTORY: REP, 2006 MAR p. 1561, Eff. 6/23/06.)

10.102.1150A PUBLIC LIBRARY STANDARDS: GENERAL

(1) Public libraries receiving state payments must meet the following essential standards by July 2007 and each year following.

(2) General essential standards for public libraries are as follows:

- (a) The library is established under Montana's laws according to 22-1-301 through 22-1-317, 22-1701 through 22-1-1711, or Title 7, MCA.
- (b) The board conforms to all applicable state, local, and federal laws, rules, and regulations.
- (c) Monthly, or at least quarterly, library board meetings are held in an accessible location at times and a place convenient to the public and according to state laws on public meetings.
- (d) The library submits the Montana Public Library Annual Statistical Report to Montana state library.

(3) General enhanced standards for public libraries are as follows:

- (a) In order for the board to be knowledgeable about current library issues, new board members receive an orientation by the library director and/or others.
- (b) On an annual basis, board members report on how they have promoted and supported the library, its programs, and services.
- (c) Library board meetings are held every other month.

(4) General excellent standards for public libraries are as follows:

- (a) The library provides for continuing education for its trustees by allocating funds to support continuing education costs, including travel expenses.
- (b) At least two members of the library board will attend a regional or statewide library related activity each year.
- (c) Board members will discuss library issues with local government officials at least twice a year, and state and/or national government officials at least once a year.
- (d) Every three years, the board will review, evaluate, and compare its own governance structure with different governance structures for the library. This includes districting, county library systems, etc.
- (e) At least three library board members join any professional library association and dues are paid by the library.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150B PUBLIC LIBRARY STANDARDS: POLICIES AND BYLAWS

(1) General essential standards for public libraries are as follows:

- (a) Every three years, the board reviews and updates its bylaws as necessary.
- (b) The board develops, studies, evaluates, reviews, updates, and adopts as necessary all library policies at least once every three years. When the board reviews library policies, the policies' effect on the library's relations with the public are evaluated.
- (c) The public must have easy access to written policies, procedures, and bylaws.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150C PUBLIC LIBRARY STANDARDS: PLANNING AND EVALUATION

(1) General essential standards for public libraries are as follows:

- (a) The board uses the Montana Public Library Annual Statistical Report to review the library's year-to-year progress and performance.
- (b) The library must have a written mission statement.
- (c) The library governing authority adopts emergency response plans that ensure the safety of the public and staff as the primary priority.

(2) General enhanced standards for public libraries are as follows:

- (a) The library has a written three to five year long-range plan, and reviews it annually. The long-range plan addresses services, facilities, public relations, technology, etc.
- (b) The board evaluates the library's performance against the stated objectives in the long-range plan.
- (c) The library must have a vision statement.

(3) General excellent standards for public libraries are as follows:

- (a) Community representatives, the board, and the director develop a long-range plan for the library.
- (b) At least every five years, the library conducts community studies and makes use of other needs assessment techniques to ensure community participation in the design and delivery of library service.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150D PUBLIC LIBRARY STANDARDS: FINANCE

(1) General essential standards for public libraries are as follows:

- (a) The board and the director follow fiscal procedures consistent with state law and local government requirements in preparing, presenting, and administering its budget.
- (b) Local tax revenues provide at least 50% of the support for the library. Grants, donations, and other revenue sources supplement but do not supplant local tax support.
- (c) The director works with the board to develop an annual financial plan or budget.
- (d) The board and the director annually review the adequacy of insurance coverage for the collection and building, and update the coverage as necessary.

(2) General enhanced standards for public libraries are as follows:

- (a) The library sets aside money in a depreciation fund to meet requirements for capital expenditures.
- (b) Local tax revenues provide at least 60% of the support for the library. Grants, donations, and other revenue sources supplement but do not supplant local tax support.

(3) General excellent standards for public libraries are as follows:

- (a) The library has established a foundation or endowment.
- (b) The foundation board and/or the library board develops a plan for planned giving.
- (c) The foundation board and/or the library board establishes a policy regarding the acceptance of gifts of real and personal property, endowment funds, and planned giving.
- (d) The library has a Friends of the Library organization.
- (e) Local tax revenues provide at least 70% of the support for the library. Grants, donations, and other revenue sources supplement but do not supplant local tax support.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150DE HUMAN RESOURCES STANDARDS: LIBRARY DIRECTOR

(1) General essential standards for public libraries are as follows:

- (a) The board hires the director according to local, state, and federal regulations and delegates the day-to-day management of the library to the director.
- (b) The board evaluates the performance of the director annually.
- (c) Each public library has a paid director who is responsible for the administration of library services.
- (d) Libraries that serve more than 25,000 people employ a library director with a graduate degree in library or information science or its equivalent.
- (e) Libraries that serve less than 25,000 people employ a library director who is or will be within three years of hire certified by the state library.

(2) General enhanced standards for public libraries are as follows:

- (a) The director conducts a formal performance appraisal of each staff member at least annually.
- (b) The library director informs the board of pending legislation that affects libraries on the local, state, and national levels.
- (c) The library director reviews and updates procedures every three years.
- (d) The library director must join the state library association.

(3) General excellent standards for public libraries are as follows:

- (a) The library director provides a climate that encourages development of innovative programs and projects by providing at least three informal staff discussions about innovative programs or opportunities.
- (b) The director keeps the community and funding officials aware of the library's purpose, planning, and services through the use of newspaper articles, websites, radio programs, attending meetings, etc.
- (c) The director forms collaborative partnerships with other agencies and organizations in the library's service area.
- (d) Libraries that serve less than 25,000 people employ a library director who has an AA/AS or higher degree.
- (e) In addition to the library director's annual evaluation, the library director is evaluated every three years by the board with the input of staff, library users, and/or library nonusers.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150F HUMAN RESOURCES STANDARDS: GENERAL

(1) General essential standards for public libraries are as follows:

- (a) The library board provides continuing education for the director and staff members by allocating funds to support continuing education costs, including travel expense and salary.
- (b) Paid staff persons are present during 90% of all open hours.
- (c) The board must adopt and review a personnel policy every three years.
- (d) The library maintains written, up-to-date job descriptions.
- (e) All libraries must have internet access for staff.

(2) General enhanced standards for public libraries are as follows:

- (a) Volunteer programs have written policies, procedures, and job descriptions.
- (b) Every staff member attends at least one continuing education eligible training program per year.
- (c) Appropriate library staff have e-mail accounts available for communication and professional development.
- (d) There is at least one personal computer for staff use only.

(3) General excellent standards for public libraries are as follows:

- (a) Regardless of population, total library staff is not less than one full-time employee.
- (b) The library board encourages and supports staff involvement in community organizations and activities.
- (c) Employees have access to health insurance and retirement through the public library.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150G HUMAN RESOURCES STANDARDS: ACCESS

(1) General essential standards for public libraries are as follows:

- (a) The board and the director determine the days of the week and the hours during the day to be open to provide maximum service.
- (b) The library is open during the week at least the following minimum hours. Many libraries exceed this minimum because the community, the board, and the director recognize that the number of hours of public service leads to greater use by the public. A library with more than one service outlet may use the total nonoverlapping hours of all outlets to meet the minimum requirement.

<u>Population</u>	<u>Minimum</u>	<u>Desirable</u>
less than 3,500	15	25-40
more than 3,500	30	40-50
more than 10,000	40	50-60
more than 25,000	50	60+

- (c) Library users who wish to copy materials available from noncirculating items or from computer files must have access to a photocopy machine or printer.
- (d) The library must have a telephone and answer telephone inquiries.
- (e) The library must provide access to resources and services for patrons with disabilities.

(2) General enhanced standards for public libraries are as follows:

- (a) Library customers are able to access library information from remote locations.
- (b) When necessary, the library refers customers to other places to fulfill the customer's information needs.

(3) General excellent standards for public libraries are as follows:

- (a) The library provides appropriate access to library services for specialized populations, including, but not limited to, the homebound, the institutionalized, and non-English speaking populations.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150H MATERIALS AND COLLECTIONS STANDARDS: COLLECTION DEVELOPMENT

(1) General essential standards for public libraries are as follows:

- (a) The board adopts a collection management policy that it reviews every three years. The policy addresses the use of electronic resources. The library submits its collection development policy to the Montana state library.
- (b) The board and the director develop an annual materials budget as part of the library budget.
- (c) The library uses at least one professionally recognized review source.
- (d) The library provides access to federal, state, and local government documents that are appropriate to its community.

(2) General enhanced standards for public libraries are as follows:

- (a) The library cooperates with other community institutions to plan and implement access to electronic resources.
- (b) The library provides access to materials for those with disabilities and others who may have special needs.
- (c) The library is on the collection management honor roll.

(3) General excellent standards for public libraries are as follows:

- (a) The library cooperates with other local and regional libraries in collection development to provide a wide range of materials in a variety of formats to meet the needs of the community.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150I PUBLIC LIBRARY STANDARDS: ACCESS TO THE COLLECTION

(1) General essential standards for public libraries are as follows:

- (a) Materials are purchased to ensure a steady flow of materials for the public.
- (b) The library catalogs and organizes its collection according to standard cataloging and classification systems and procedures. Automated records comply with the machine-readable catalog (MARC) format.
- (c) The library offers interlibrary loan and follows the Montana state interlibrary loan protocols.

(2) General enhanced standards for public libraries are as follows:

- (a) The library uses an online interlibrary loan system.
- (b) The library has an automated system for circulation, cataloging, and public access catalogs that has reporting features and supports MARC records.

(3) General excellent standards for public libraries are as follows:

- (a) The library collection is available online.
- (b) The library, if appropriate, has joined a shared integrated library system, also known as a shared catalog.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150J PUBLIC LIBRARY STANDARDS: COLLECTION EVALUATION

(1) General essential standards for public libraries are as follows:

- (a) The library's collection is continually evaluated based on the library's collection management policy. The entire collection is evaluated within each three-year period.

(2) General enhanced standards for public libraries are as follows:

- (a) The library monitors the use of the collection through analyzing statistical information, including circulation per capita and the collection's turnover rate.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150K PUBLIC LIBRARY FACILITIES STANDARDS

(1) General essential standards for public libraries are as follows:

- (a) The board and the director evaluate the library building every three years to determine adequate space needs.
- (b) The board and the director address any identified facility shortcomings in a building plan.
- (c) The library facility is safe for the public and staff.
- (d) The library's facilities conform to local requirements for accessibility.

(2) General enhanced standards for public libraries are as follows:

- (a) The library has an exterior sign visible from the nearest roadway that identifies it as the library.
- (b) The library has a public meeting area available.
- (c) The library facility is evaluated for accessibility.

(3) General excellent standards for public libraries are as follows:

- (a) The library has adequate, well-lit parking.
- (b) The library's facilities conform to federal requirements for accessibility.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150L PUBLIC LIBRARY PUBLIC RELATIONS STANDARDS

(1) General essential standards for public libraries are as follows:

- (a) The library cooperates in state, regional, and national efforts to promote library services.
- (b) The library uses basic PR/marketing tools such as brochures, flyers, bookmarks, newspaper, radio, TV, public service outlets, websites, story times, displays, and programs in the library.

(2) General enhanced standards for public libraries are as follows:

- (a) The library targets special groups within the community for programs or services (seniors, ethnic populations, etc.)
- (b) Funds are budgeted for publicity either by the library and/or the Friends of the Library.
- (c) Staff and board are encouraged to bring the library's message to the community at appropriate venues.

(3) General excellent standards for public libraries are as follows:

- (a) The library allocates funds for public relations, has a community awareness program, and actively promotes its mission.
- (b) The library conducts a community assessment to evaluate the library's marketing efforts.
- (c) The library establishes or works with existing community advisory groups to encourage community involvement and improve service. Examples of such groups include youth, seniors, genealogy, local history, and other identified segments of the population.
- (d) The library has a Friends of the Library organization.
- (e) The library maintains an up-to-date webpage.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1150M PUBLIC LIBRARY SERVICES STANDARDS

(1) General essential standards for public libraries are as follows:

- (a) On an annual survey, library customers indicate that they have received courteous and helpful service from all library staff.
- (b) The library uses comparative statistics, annual surveys, or other methods to evaluate the services offered.
- (c) The library offers programming for children and adults.
- (d) The library has policies and/or procedures for services provided.
- (e) The Library programming is free and open to all.
- (f) The library must make every effort to maintain confidentiality of library records as addressed in 22-1-1103, MCA.

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- (g) Core library services as defined by the local community and library are provided all hours the library is open. Examples include lending circulating materials, reference, and interlibrary loan.

(2) General enhanced standards for public libraries are as follows:

- (a) The library provides information about the community to customers.
- (b) The library offers programming for children, adults, and young adults.
- (c) The library offers or makes patrons aware of virtual reference services.

(3) General excellent standards for public libraries are as follows:

- (a) The library collaborates with other community organizations and educational institutions to promote library services.
- (b) The library provides library outreach services.
- (c) The library has a Friends of the Library organization. (d) The library has wireless internet access for patrons.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330, 22-1-331, MCA

10.102.1151 CERTIFICATION STATEMENT

- (1) The Montana state library will send a certification statement to public libraries each fiscal year.
 - (a) This statement will provide for a status report regarding each essential standard and will require the signature of the library director and the library board chair.
 - (b) The signed and dated certification statement will be returned to the state library by July 25th of each year.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1,329, 22-1-330, 22-1-331, MCA

10.102.1152 DEFERRALS

- (1) Any library may request a waiver from the state librarian in writing by July 25th of each year.
 - (a) The state librarian may grant a waiver of any of the standards in ARM 10.102.1150E if:
 - (i) through (b) remain the same.
 - (c) Any library may request a one-year extension of the waiver from the state librarian in writing by July 25th of each year. The library shall provide the state librarian with an updated compliance plan and a statement that the application of the standard will cause a hardship.
 - (d) remains the same.
 - (e) Any library that employs a director without a graduate degree in library or information science or its equivalent as of July 1, 2001 is exempt from ARM 10.102.1150E.

AUTH: 22-1-103, MCA. IMP: 22-1-103, MC

10.102.1153 FINAL ARBITER

(1) For any questions arising because of ARM 10.102.1151, 10.102.1152, 10.102.1154 through 10.102.1157, [10.102.1150A through 10.102.1150M, the final arbiter is the state library commission.

AUTH: 22-1-103, MCA. IMP: 22-1-103, MCA

10.102.1154 APPEALS PROCESS

(1) remains the same.

(a) Any public library shall have the right to appeal. The request for the appeal shall be made to the State Librarian at P. O. Box 201800, Helena, MT 59620-1800 (406) 444-3115) within 12 working days of the receipt of the letter denying payment.

(b) through (f) remain the same.

AUTH: 22-1-103, MCA. IMP: 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-3-330, 22-1-331, MCA

10.102.1155 ANNUAL STATISTICAL REPORT

(1) The commission, in setting up minimum standards of free public library service and in certifying such libraries for state monies shall require the filing of an annual statistical report.

(a) This annual report may include such types of information as the Montana state library commissioners shall deem necessary.

(b) In no instance shall the commission require new cumulations of statistical data without providing to each affected public library, 60 days prior to the beginning of the period of which information will be collected, notice of the commission's intention to require such cumulations as part of the annual report. (History: Sec. 22-1-103, MCA; IMP, Sec. 22-1-103, 22-1-326, 22-1-327, 22-1-328, 22-1-329, 22-1-330 and 22-1-331, MCA; NEW, 1999 MAR p. 2626, Eff. 11/19/99.)

10.102.1156 EFFECTIVE DATE

(1) In order to give all public libraries time to meet these standards, ARM 10.102.1150A through 10.102.1150M will become effective on July 1, 2006.

(2) The effective date for certification requirement of ARM 10.102.1150A through 10.102.1150M is July 1, 2007.

AUTH: 22-1-103, MCA. IMP: 22-1-103, MCA

Appendix C: Calendar of Annual Events and Deadlines

Trustees can take part in numerous events, activities and continuing education (CE) opportunities. This calendar shows the typical schedule, as well as the timing for important Board decisions. Deadlines and specific Board duties are coded with a “B.”

Events and CE Opportunities		Deadlines
January	<ul style="list-style-type: none">American Library Association (ALA) midwinter conference	<ul style="list-style-type: none">Montana State Library (MSL) Library Directory distributedMSL Public Library Annual Statistics distributed
February	<ul style="list-style-type: none">MSL Commission meetingMontana Library Association (MLA) OFFLINE Interest Group retreat	<ul style="list-style-type: none">Complete preliminary budget (B)
March	<ul style="list-style-type: none">Public Library Association (PLA) conference (even-numbered years)Spring Federation meetings	<ul style="list-style-type: none">Adopt preliminary budget (B)
April	<ul style="list-style-type: none">MLA annual conferenceMSL Commission meetingSpring Federation meetings	<ul style="list-style-type: none">MSL Collection Management Honor Roll announcedSubmit preliminary budget to funding body (B)
May		<ul style="list-style-type: none">Director's evaluation (B)Review library policies (B)Federation plans of service due
June	<ul style="list-style-type: none">ALA annual conferenceMSL Commission meetingMSL Summer InstituteAssociation for Library Trustees and Advocates (ALTA) annual conference	<ul style="list-style-type: none">Close out budget for current yearComplete Board evaluation for past year (B)Adopt and submit final budget for upcoming year (B)

Events and CE Opportunities		Deadlines
July		<ul style="list-style-type: none"> • Interlibrary loan (ILL) reimbursement form due • Board orientation for new trustees (B)
August	<ul style="list-style-type: none"> • MSL Commission meeting • Pacific Northwest Library Association (PNLA) annual conference 	<ul style="list-style-type: none"> • Approve and submit final annual report to governing body and MSL (B) • Governing body approves and adopts final budget (B)
September	<ul style="list-style-type: none"> • Fall Federation meetings • MSL fall workshop 	<ul style="list-style-type: none"> • MSL Public Library Annual Statistics data due • State aid checks distributed • ILL reimbursement distributed
October	<ul style="list-style-type: none"> • Fall Federation meetings • Montana Education Association/ Montana Federation of Teachers (MEA/MFT) annual fall conference • MLA Academic/Special Library and Public Library Division retreat • MSL Commission meeting 	<ul style="list-style-type: none"> • MSL Library Directory information due
November		<ul style="list-style-type: none"> • Federation annual reports due
December	<ul style="list-style-type: none"> • MSL Commission meeting 	<ul style="list-style-type: none"> • Collection management policies due
<p>For details about events listed, visit the online Montana Library Event Calendar: http://mtlib.org.</p>		

Appendix D. Freedom to Read Statement

The Freedom to Read Statement was originally issued in May of 1953 by the Westchester Conference of the American Library Association and the American Book Publishers Council, which in 1970 consolidated with the American Educational Publishers Institute to become the Association of American Publishers. The statement was revised in 1972, 1991 and 2000. The ALA Council and the AAP Freedom to Read Committee adopted the following version on July 12, 2000. Numerous other organizations have also voiced their support for this statement.

The freedom to read is essential to our democracy. It is continuously under attack. Private groups and public authorities in various parts of the country are working to remove or limit access to reading materials, to censor content in schools, to label “controversial” views, to distribute lists of “objectionable” books or authors, and to purge libraries. These actions apparently rise from a view that our national tradition of free expression is no longer valid; that censorship and suppression are needed to avoid the subversion of politics and the corruption of morals.

We, as citizens devoted to reading and as librarians and publishers responsible for disseminating ideas, wish to assert the public interest in the preservation of the freedom to read.

Most attempts at suppression rest on a denial of the fundamental premise of democracy: that the ordinary citizen, by exercising critical judgment, will accept the good and reject the bad. The censors, public and private, assume that they should determine what is good and what is bad for their fellow citizens.

We trust Americans to recognize propaganda and misinformation, and to make their own decisions about what they read and believe. We do not believe they need the help of censors to assist them in this task. We do not believe they are prepared to sacrifice their heritage of a free press in order to be “protected” against what others think may be bad for them. We believe they still favor free enterprise in ideas and expression.

These efforts at suppression are related to a larger pattern of pressures being brought against education, the press, art and images, films, broadcast media, and the Internet. The problem is not only one of actual censorship. The shadow of fear cast by these pressures leads, we suspect, to an even larger voluntary curtailment of expression by those who seek to avoid controversy.

Such pressure toward conformity is perhaps natural to a time of accelerated change. And yet suppression is never more dangerous than in such a time of social tension. Freedom has given the United States the elasticity to endure strain. Freedom keeps open the path of novel and creative solutions, and enables change to come by choice. Every silencing of a heresy, every enforcement of an orthodoxy, diminishes the toughness and resilience of our society and leaves it the less able to deal with controversy and difference.

Now as always in our history, reading is among our greatest freedoms. The freedom to read and write is almost the only means for making generally available ideas or manners of expression that can initially command only a small audience. The written word is the natural medium for the new idea and the untried voice from which come the original contributions to social growth. It is essential to the extended discussion that serious thought requires, and to the accumulation of knowledge and ideas into organized collections.

We believe that free communication is essential to the preservation of a free society and a cre-

ative culture. We believe that these pressures toward conformity present the danger of limiting the range and variety of inquiry and expression on which our democracy and our culture depend. We believe that every American community must jealously guard the freedom to publish and to circulate, in order to preserve its own freedom to read. We believe that publishers and librarians have a profound responsibility to give validity to that freedom to read by making it possible for the readers to choose freely from a variety of offerings. The freedom to read is guaranteed by the Constitution. Those with faith in free people will stand firm on these constitutional guarantees of essential rights and will exercise the responsibilities that accompany these rights.

We therefore affirm these propositions:

1. It is in the public interest for publishers and librarians to make available the widest diversity of views and expressions, including those that are unorthodox or unpopular with the majority.

Creative thought is by definition new, and what is new is different. The bearer of every new thought is a rebel until that idea is refined and tested. Totalitarian systems attempt to maintain themselves in power by the ruthless suppression of any concept that challenges the established orthodoxy. The power of a democratic system to adapt to change is vastly strengthened by the freedom of its citizens to choose widely from among conflicting opinions offered freely to them. To stifle every nonconformist idea at birth would mark the end of the democratic process. Furthermore, only through the constant activity of weighing and selecting can the democratic mind attain the strength demanded by times like these. We need to know not only what we believe but why we believe it.

2. Publishers, librarians, and booksellers do not need to endorse every idea or presentation

they make available. It would conflict with the public interest for them to establish their own political, moral, or aesthetic views as a standard for determining what should be published or circulated.

Publishers and librarians serve the educational process by helping to make available knowledge and ideas required for the growth of the mind and the increase of learning. They do not foster education by imposing as mentors the patterns of their own thought. The people should have the freedom to read and consider a broader range of ideas than those that may be held by any single librarian or publisher or government or church. It is wrong that what one can read should be confined to what another thinks proper.

3. It is contrary to the public interest for publishers or librarians to bar access to writings on the basis of the personal history or political affiliations of the author.

No art or literature can flourish if it is to be measured by the political views or private lives of its creators. No society of free people can flourish that draws up lists of writers to whom it will not listen, whatever they may have to say.

4. There is no place in our society for efforts to coerce the taste of others, to confine adults to the reading matter deemed suitable for adolescents, or to inhibit the efforts of writers to achieve artistic expression.

To some, much of modern expression is shocking. But is not much of life itself shocking? We cut off literature at the source if we prevent writers from dealing with the stuff of life. Parents and teachers have a responsibility to prepare the young to meet the diversity of experiences in life to which they will be exposed, as they have a responsibility to help them learn to think critically for themselves.

These are affirmative responsibilities, not to be discharged simply by preventing them from reading works for which they are not yet prepared. In these matters values differ, and values cannot be legislated; nor can machinery be devised that will suit the demands of one group without limiting the freedom of others.

5. It is not in the public interest to force a reader to accept with any expression the prejudgment of a label characterizing it or its author as subversive or dangerous.

The ideal of labeling presupposes the existence of individuals or groups with wisdom to determine by authority what is good or bad for the citizen. It presupposes that individuals must be directed in making up their minds about the ideas they examine. But Americans do not need others to do their thinking for them.

6. It is the responsibility of publishers and librarians, as guardians of the people's freedom to read, to contest encroachments upon that freedom by individuals or groups seeking to impose their own standards or tastes upon the community at large.

It is inevitable in the give and take of the democratic process that the political, the moral, or the aesthetic concepts of an individual or group will occasionally collide with those of another individual or group. In a free society individuals are free to determine for themselves what they wish to read, and each group is free to determine what it will recommend to its freely associated members. But no group has the right to take the law into its own hands, and to impose its own concept of politics or morality upon other members of a democratic society. Freedom is no freedom if it is accorded only to the accepted and the inoffensive.

7. It is the responsibility of publishers and librarians to give full meaning to the freedom to read by providing books that enrich the quality and diversity of thought and expression. By the exercise of this affirmative responsibility, they can demonstrate that the answer to a "bad" book is a good one, the answer to a "bad" idea is a good one.

The freedom to read is of little consequence when the reader cannot obtain matter fit for that reader's purpose. What is needed is not only the absence of restraint, but the positive provision of opportunity for the people to read the best that has been thought and said. Books are the major channel by which the intellectual inheritance is handed down, and the principal means of its testing and growth. The defense of the freedom to read requires of all publishers and librarians the utmost of their faculties, and deserves of all citizens the fullest of their support.

We state these propositions neither lightly nor as easy generalizations. We here stake out a lofty claim for the value of the written word. We do so because we believe that it is possessed of enormous variety and usefulness, worthy of cherishing and keeping free. We realize that the application of these propositions may mean the dissemination of ideas and manners of expression that are repugnant to many persons. We do not state these propositions in the comfortable belief that what people read is unimportant. We believe rather that what people read is deeply important; that ideas can be dangerous; but that the suppression of ideas is fatal to a democratic society. Freedom itself is a dangerous way of life, but it is ours.
